

Application for Probate - Checklist

To ensure your Probate application is ready, use this checklist to gather all necessary information. Your application will be in affidavit form, requiring accurate and complete details. Wait to send this form until all relevant parties' full names are provided and any potential conflicts of interest are ruled out. This process ensures that when you swear or affirm the affidavit, all information is accurate and complete.

Documents Required

You will need to bring the original documents to your signing appointment, however copies are sufficient at this stage.

- Original Will (Do not remove any staples or bindings)
- Original Codicil(s) (if applicable)
- Original death certificate
- Any other document of a testamentary nature
- Copy of photo ID (driver's licence or passport) for each applicant

Details of the First Executor(s)

Full Name: _____

Address: _____

Occupation: _____

Telephone: _____

Email: _____

Agrees to be an executor: Yes No*

***Note:** In the event that the initial executor(s) are alive but unwilling to proceed, they must formally renounce their right to seek Probate. Necessary forms will be provided for their signature. If the primary executor(s) are unable to act due to death or incapacity, submission of supporting documents such as a death certificate or proof of their incapacity (e.g., court order or medical letter) is required.

Details of the Second Executor (if any)

Full Name: _____

Address: _____

Occupation: _____

Telephone: _____

Email: _____

Agrees to be an executor: Yes No

Witnesses to the Will

	Witness #1	Witness #2
Full Name:	_____	_____
Current Residential Address (if known):	_____ _____	_____ _____
Are they Deceased?:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Searches carried out if you can't locate them:*	<input type="checkbox"/> White Pages	<input type="checkbox"/> White Pages
	<input type="checkbox"/> Telephone	<input type="checkbox"/> Telephone
	<input type="checkbox"/> Contact lawyer	<input type="checkbox"/> Contact lawyer
	<input type="checkbox"/> Property search	<input type="checkbox"/> Property search

***Note:** The Court mandates that you furnish the present residential address for every witness mentioned in the Will. In the event that you are unable to procure the address, it is imperative that you outline the thorough searches you have conducted in an attempt to locate it. Typically, proof of conducting searches is acceptable, unless the witness is called upon to provide testimony concerning the Will. Notify us if you require aid in conducting these searches. Extra fees may be applicable.

Assets & Liabilities

When submitting the application, please provide a comprehensive statement detailing the assets and liabilities of the deceased with their respective values as of the date of death. The Court mandates a thorough explanation of each asset and liability, which may include account numbers. Although bank account statements and additional evidence are not typically obligatory, it is advisable to carry such documents if you encounter challenges in describing the assets or liabilities. Unless specified otherwise, all assets listed are presumed to be located in Western Australia

ASSETS

Property

Address
.....

Bank Account(s)

Bank:
Account type:
BSB:
Account:
Balance:

Vehicle(s)

Make:
Model:
Year:
Rego:

Shares

Company:
ASX code:
No. of shares:

Aged care accommodation bond

Details/Description:
Approx. Value: \$.....

Personal effects/Other

Details/Description:
Approx. Value: \$.....

Details/Description:
Approx. Value: \$.....

Details/Description:
Approx. Value: \$.....

LIABILITIES

Mortgage(s)

Details/Description:
Approx. Value: \$.....

Personal loan(s)

Details/Description:
Approx. Value: \$.....

Credit Card(s)/Other(s)

Details/Description:
Approx. Value: \$.....

Details/Description:
Approx. Value: \$.....

Details/Description:
Approx. Value: \$.....